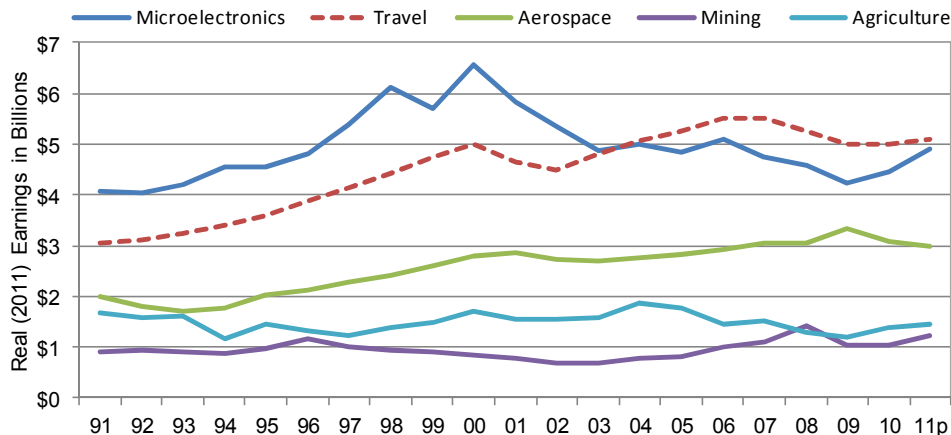


Travel and Tourism Works for Arizona

Arizona's Travel & Tourism Industry Economic Impact

- No other Arizona industry produces the same economic impact for the Grand Canyon State as the Arizona tourism industry. Tourism is Arizona's top export-oriented industry and directly impacts all 15 counties.
- By generating thousands of jobs, millions of dollars in earnings, and billions of dollars in tax revenues, tourism is vital to Arizona's economic vitality. Tourism is a driving force in establishing the "quality of life" message and amenities that are necessary to make Arizona an attractive place to live, work and visit.
- Widely recognized as a blue-chip industry, Arizona's tourism industry provides a stabilizing and diversifying affect on local and state economies. The table below illustrates a 20-year perspective on annual earnings generated through tourism, displaying a consistent growth and contribution to the state's economy.

Annual Earnings, Selected Arizona Export-Oriented Industries 1991-2011 Constant (2011) Dollars



Arizona Office of Tourism's (AOT) Impact on the State

- AOT is the only statewide tourism entity that markets Arizona as a premier leisure travel destination to national and international visitors. This type of marketing activity brings new money into the state, enhancing the total economic impact of the Arizona tourism industry.
- To remain competitive for visitor dollars in the global tourism market and to increase the economic impact from this dynamic industry, it is vital that AOT continues to brand and market Arizona as a premier travel destination to bring even more travelers to the state.
- AOT continues to demonstrate success in effectively using state funds to market Arizona. Tourism is a fiercely competitive global industry. Tourism budgets from destinations outside of Arizona are increasing overall and new competition for those extremely valued traveler dollars emerges every day.

By The Numbers

All Data 2011

37.6 Million: Number of domestic and international overnight visitors who experienced Arizona as a travel destination.

4.8 Million: Number of international overnight visitors to Arizona, including Mexico and Canada.

\$18.3 Billion: Amount of direct traveler spending generated within Arizona.

\$50 Million: Amount of direct traveler spending being contributed to our state's economy every *single* day.

157,700: Number of industry related jobs directly generated by traveler spending. When combined with indirect employment, direct traveler spending impacts nearly 300,000 jobs.

\$5.1 Billion: Amount of earnings generated by Arizonans employed by tourism jobs.

\$2.7 Billion: Amount of local, state and federal tax revenues generated as a result of direct traveler spending.

\$1,030: Tax revenue generated by the tourism industry lessens the annual tax burden by \$1,030 for *every* Arizona household.

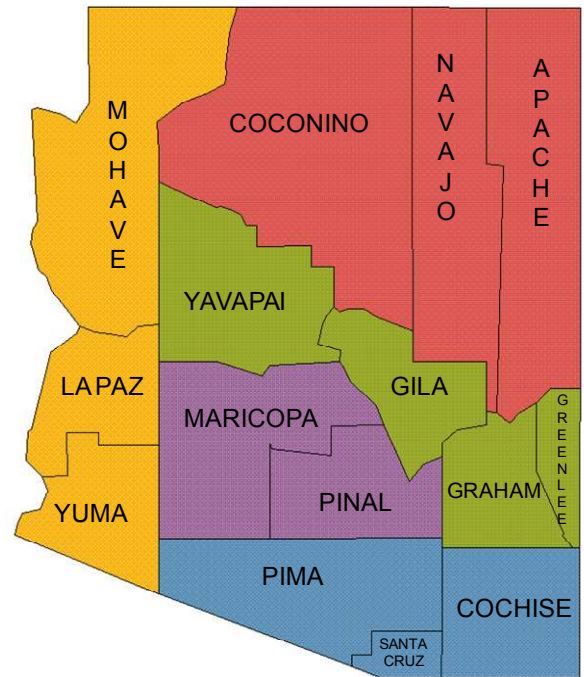
No. 1: Where the travel and tourism industry ranks among Arizona's export-oriented industries.

#15: Arizona ranks #15 with 2.8 percent of the domestic U.S. visitation in comparison to other states.

Arizona Travel & Tourism Economic Impact by County

County	Direct Travel Spending	Jobs Generated	Earnings Generated	Taxes Generated
Apache	138.5 M	1,700	\$30.5 M	\$8.3 M
Cochise	\$330.4 M	3,990	\$77.1 M	\$24.6 M
Coconino	\$1.0 B	11,060	\$284.0 M	74.2 M
Gila	\$226.9 M	2,600	\$54.0 M	\$9.2 M
Graham & Greenlee*	\$47.1 M	850	\$10.7 M	\$3.3 M
La Paz	\$210.8 M	1,240	\$29.7 M	\$10.2 M
Maricopa	\$11.2 B	85,430	\$3.4 B	\$748.0 M
Mohave	\$462.0 M	4,620	\$98.9 M	\$29.3 M
Navajo	\$286.9 M	3,140	\$70.6 M	\$17.4 M
Pima	\$2.4 B	21,820	\$537.0 M	\$135.7 M
Pinal	\$507.4 M	5,070	\$119.8 M	\$30.2 M
Santa Cruz	\$211.1 M	1,600	\$39.1 M	\$12.0 M
Yavapai	\$677.2 M	8,240	\$183.6 M	\$40.8 M
Yuma	\$616.4 M	6,330	\$150.6 M	\$39.6 M

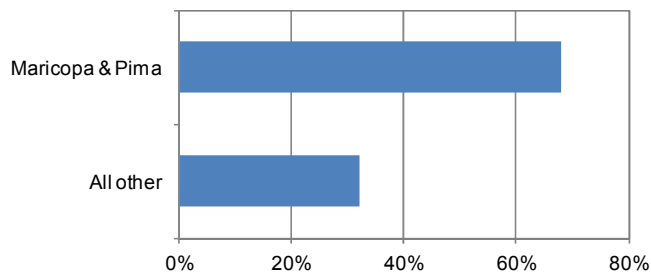
* Graham and Greenlee Counties have a combined economic impact in regards to tourism.



- The chart above displays the amount of direct travel spending by county, along with the number of jobs, earnings and taxes directly generated as a result of visitor spending.
- The color-coded map reflects the marketing regions developed by the Arizona Office of Tourism: Gold, West Coast; Red, Northern; Green, North Central; Purple, Phoenix & Central; Blue, Tucson & Southern. These regions are used strictly for AOT advertising and promoting purposes.
- The two graphs below reference 2011 travel employment in Arizona and displays the important role tourism plays in Arizona communities.

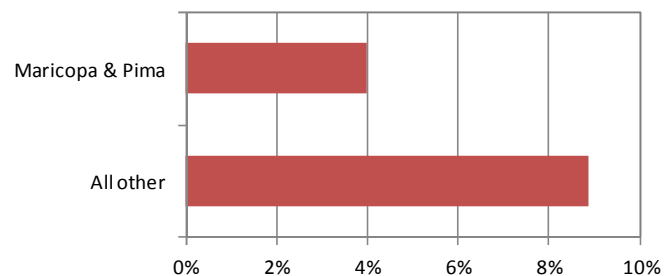
2011p, Distribution of Travel-Generated Employment

Percent of State Direct Travel-Generated Employment



2011p, Travel-Generated Employment as Percent of Total Area Employment

Percent of Total Area Employment that is Travel-Generated



- Both these graphs show the two most populous counties in Arizona, Maricopa and Pima, compared to the thirteen other counties in the state with respect to their share of total employment. The bar graph on the left (in blue) shows that nearly 70 percent of travel-generated employment is within the counties of Maricopa and Pima. But in referencing the bar graph on the right (in red), Travel employment is actually more significant in the non-metropolitan areas of the state.

Sources: Tourism Economics, Longwoods International, 2007-08 Mexican Visitors to Arizona, US Department of Commerce-Office of Travel & Tourism Industries, Statistics Canada, Dean Runyan Associates, Strategic Marketing & Research Inc., U.S. Travel Association

www.azot.gov—business-to-business site ~ www.arizonaguide.com—consumer site

For more information, contact AOT's Public Information Officer at 602-364-3724

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